



Interim Review Documentation

Preface

In Edison “Interim Review Documentation” is simply documenting **DATES Performance Reviews** were held and capturing the employee’s acknowledgement the discussion occurred.

The Manager will **document** the actual **discussions** OUTSIDE the Edison System (on **paper**). Managers may use the **Interim Review Form** traditionally used to document **Interim Review Discussions**.

Prior to discussing an **Interim Review** with an **Employee** the **Manager** should provide the **Reviewer** with a copy.

The **Reviewer** will notify the **Manager** of approval or recommended changes to the document OUTSIDE the Edison System: in person, by telephone, or by email.

Once the **Reviewer** has approved the document the **Manager** can discuss the **Interim Review** with the **Employee** and provide the **Employee** with a **paper copy** of the **document**.

The **Date of Discussion** will need to be entered into Edison after the **Interim Review** has been discussed with the **Employee** to document the occurrence of this discussion.

The **Interim Review** information in Edison is for **tracking purposes**. The actual **Interim Review** is the **paper copy** developed OUTSIDE of the Edison System.

Up to three **Interim Review** documentation pages (Interim 1, Interim 2, Interim 3) may be created in Edison per employee, per evaluation cycle.

This is a two step process

1. **Make the Interim Review Document Available**
2. **Acknowledge & Complete the Interim Review Document**

Note: This is a summary of the steps found in the Edison PE training and is offered as a supplemental tool. It is not a substitute for that training which is available on the Edison home page using the following path: Edison Support Information > HCM > Human Resources > Reference Materials / Policy & Procedure

Remember: The Interim Performance Review period is an observation period. **Documented** Performance Review discussions should occur approximately 90 days after the Job Plan discussion and approximately 90 days before the Formal Evaluation discussion.

1. Make the Interim Review Document Available

Go to: Manager Self Service>Performance Management>Performance Documents>Current Documents

- You will see a list of **Current Performance Documents** for which you are the Manager. Note the **Status** of each document.
- Click the appropriate **Interim** in the **Document Type** column.
- Note the **Not Started** in the **Status** column.
- Click the **Start** link at the end of the row.
- Click the **Available for Review** button. This will allow the employee to view this Interim Work Review documentation page using Employee Self Service.
- Click **OK** to confirm that the employee can view the document. You are returned to the **Document Details** page.

NOTE: A link is now provided at the end of the row to the next step in the **Interim Work Review** documentation page process.

- Click the **Mark Review Held** link.
- Click the **Date of Discussion** field. Enter the date you discussed the review with the employee.
- Click the **Review Held** button.
- Click **OK** to confirm that the performance review was conducted.

2. Acknowledge & Complete the Interim Review Documentation Page

Go to: Manager Self Service>Performance Management>Performance Documents>Current Documents

- Click the appropriate **Document Type**.

Note: A link is provided to the next step in the process.

If the **Employee** has performed the acknowledgement step, the link displayed here will be **Complete** instead of **Acknowledge**.

✓ You have successfully acknowledged your evaluation.

Performance Document Details	
Employee: Adams Adams	Job Title: CLERK 2
Document Type: Interim 1	Period: 03/01/2008 - 06/25/2008
Manager: Smithy Smith	Status: Acknowledged
Template Name: Interim Review 1	

Document Progress		
Step	Status	Due Date
Complete Manager Evaluation	🟢 Acknowledged	06/25/2008 View Complete

For the example below, assume that the employee did not acknowledge the Interim Review.

- Click the **Acknowledge** link.
- Click the **Acknowledge Review** button.
 - The **Manager Override** option is defaulted.
 - The **Manager Override** should be used when the **Employee** temporarily does not have access to a computer and is, therefore, unable to **Acknowledge** the document themselves.

In this case the **Manager is Acknowledging** the performance document on the **Employee's** behalf.

(**Employee Refused** should be selected when the **Employee** fails or refuses to **Acknowledge** a performance evaluation document in a timely manner.)

Important: The **Employee Refused** option **must not be selected without the prior approval of the Reviewer.**

Note: A link is now provided at the end of the row to **Complete** the last step in the **Interim Review** documentation process.

- Click **Complete**.
- Click **Complete**.
- To confirm that you would like to mark the evaluation as completed, click **Complete**. Do not complete this evaluation until you have finalized each section.
- Click **OK**.